

WEEKLY PERFORMANCE SUMMARY

WEEKLY INTEGRATED NIELSEN - W/E 4/23/94

ALL OUTLETS COMBINED:

- PM's weekly share advanced +0.6 points versus week-ago to 46.4%, with performance driven primarily by Marlboro. The company's four week share gained +0.3 points versus four weeks-ago to 45.9% (its highest level to date), as Marlboro increases were partially offset by PM's Private Label losses.
- Marlboro's share gained +0.4 points both on a week-to-week and four week basis to 28.2% and 27.8% respectively. Performance was positive in all four trade classes with four week share gains ranging from +0.3 to +0.4. To some extent, performance likely benefited from Country Store themed direct mail support (circulation: 3.8 million) scheduled to drop during the last weeks of March and the initial weeks of April.
- PM's Other Premium brands were stable on both a week-to-week and four week basis at 9.1%, while Discount brands increased +0.1 points versus week-ago to 9.1%, driven by Basic.
- RJR's share declined -0.5 points versus week-ago to 28.8%, reflecting losses to their Premium and Discount franchises. On a four week basis, the manufacturer's performance was down -0.3 points versus four weeks-ago to 29.2% (its lowest level since February 1992), as Winston, Doral, Monarch, and Best Value declines were partially offset by Camel advances.
- The Discount Category's share declined -0.2 points both on a week-to-week and four week basis, as the Branded Discount and Private Label segments each experienced -0.1 point losses over both time periods.

CONVENIENCE STORES (800 STORES):

- PM experienced a +0.6 point gain week-to-week to 48.2%, with Marlboro and Basic accounting for the majority of the gain. On a four week basis, PM's share increased +0.2 points versus four weeks ago to 47.9%.
- Marlboro's weekly share was 31.1%, up +0.4 points versus week ago, while on a four week basis the franchise gained +0.3 points versus the prior four week period.
- RJR's share declined -0.4 points versus week-ago to 28.0%, with weekly declines by Winston, Doral and Monarch more than offsetting modest gains by Camel. On a four week basis, RJR's performance declined -0.1 points versus the prior four week period.

Camel's four week share increased +0.3 points versus four weeks ago to 4.9% as performance is likely benefiting from an increased incidence of free product deals (primarily B2G1F's), up +17 points since the w/e March 12 to 32%, its highest level since July 1993.

- The Discount Category's weekly share decreased -0.3 points versus week ago to 33.0%, while on a four week basis, the category's performance declined -0.1 versus four weeks ago.

2060083590

BENCHMARKS

NIELSEN DATA W/E 4/23/94

ALL OUTLETS COMBINED:

- All benchmarks are favorable with the exception of Basic's Share of Discount.

BENCHMARKS - TOTAL US

WEEKLY INTEGRATED NIELSEN - ALL OUTLET COMBINED

	Target	Benchmarks*	4 w/e 23-Apr	Current vs. Benchmark
Philip Morris	44.3	44.5(lower limit)	45.9	1.4 Favorable
Marlboro	25.7	26.3(lower limit)	27.8	1.5 Favorable
OPB	8.8	8.9 (lower limit)	9.1	0.2 Favorable
Virginia Slims	2.7	2.7 (lower limit)	2.9	0.2 Favorable
Benson & Hedges	2.5	2.5 (lower limit)	2.7	0.2 Favorable
Merit	2.8	2.8 (lower limit)	2.9	0.1 Favorable
Parliament	0.6	0.6 (lower limit)	0.6	0.0 Favorable
Basic Shr. of Disc. (SOC)	15.1	14.5(lower limit)	14.3	0.2 Unfavorable
Discount Category	34.5	+2.0 Pts. (upper limit)**	32.3	2.2 Favorable
Private Label	8.5	9.0 (upper limit)	7.7	1.3 Favorable

* Revised to reflect 1994 First Revised Forecast.

** Annualized category growth (upper limit) is +2.0 points. First 6 months of 1994 total Discount category cannot exceed 34.5%.

CONVENIENCE STORES:

- All benchmarks are favorable with the exception of Basic's Share of Discount.

BENCHMARKS - TOTAL US

NIELSEN WEEKLY C-STORE AUDITS (800 STORES)

	Benchmarks	4 Weeks Ending 23-Apr	Current vs. Benchmark
Philip Morris	45.2 (lower limit)	47.9	2.7 Favorable
Marlboro	28.2 (lower limit)	30.7	2.5 Favorable
OPB	7.7 (lower limit)	8.0	0.3 Favorable
Virginia Slims	2.3 (lower limit)	2.3	0.0 Favorable
Benson & Hedges	2.2 (lower limit)	2.4	0.2 Favorable
Merit	2.6 (lower limit)	2.6	0.0 Favorable
Parliament	0.4 (lower limit)	0.5	0.1 Favorable
Basic - Shr. of Discount	16.3 (lower limit)	15.1	1.2 Unfavorable
Discount Category	+2.0 Pts. (upper limit)*	33.2	1.7 Favorable
Private Label	10.2 (upper limit)	9.3	0.9 Favorable
Lowest Disc. Price **	\$1.34 (lower limit)	\$1.34	\$0.00 Favorable
Absolute Price Gap ***	\$0.57 (upper limit)	\$0.57	\$0.00 Favorable

* Annualized category growth (upper limit) is +2.0 points. First 6 months of 1994 total Discount category cannot exceed 34.9%.

** Source: Nielsen Weekly Pricing Audits (linear average)

***Marlboro versus lowest Discount.

2060083591